

# WATERLOO REGISTRAR'S OFFICE

## Job Description Form

JOB INFORMATION			
<i>Job Title</i>	<b>Director, Student Awards &amp; Financial Aid</b>	<i>Position ID</i>	
<i>Division/Department</i>	Registrar's Office		
<i>Location</i>	Main Campus		
<i>Reports to Job Title</i>	University Registrar	<i>Reports to Position ID</i>	
<i>Jobs Reporting (Job Titles and IDs)</i>	Manager, Financial Aid Systems Manager, Undergraduate Awards Assistant Director, Student Awards & Financial Aid Financial Aid Assistant, International Financial Aid Assistant, Special Programs and Work Study		
<i>Full-time Equivalent</i>	100%		
<i>Effective Date</i>	June 2013		
<i>Grade</i>	USG 14		
PRIMARY PURPOSE			
<p>The Director, Student Awards and Financial Aid ("the Director") is the senior manager responsible for the Student Awards and Financial Aid (SAFA) division of the Registrar's Office. S/he must maintain a productive working relationship with managers and staff in the Registrar's Office, Deans and Associate Deans, College Heads, Cooperative Education and Career Action, numerous Faculty and College based personnel who deal with financial aid, scholarships and customer service matters, and managers and department heads in other administrative departments. S/he must also work effectively with the senior managers at other Ontario Universities and the Ministry of Training, Colleges and Universities.</p>			
KEY ACCOUNTABILITIES			
1	<b>Develops and maintains an organizational structure that reflects the university's culture and supports its mission</b> <ul style="list-style-type: none"> <li>o advises and makes recommendations to senior committees and councils of the University, such as Executive Council and Deans' Council</li> <li>o Liaises externally with professional, community and government organizations, and agencies on behalf of the organization</li> </ul>		
2	<b>Provides effective overall direction and leadership to staff including</b> <ul style="list-style-type: none"> <li>o enlightened change management</li> <li>o ensuring fair performance evaluations</li> <li>o providing job-related training</li> <li>o encouraging staff participation in personal and professional development on an on-going basis</li> <li>o facilitate effective internal communication and team building with the result that SAFA staff are nimble, flexible and adept at dealing with the heavy workload and constant change imposed from outside the University</li> </ul>		
3	<b>Provides effective administrative support systems</b> <ul style="list-style-type: none"> <li>o ensures that the SAFA division has the proper tools and systems support to carry out its mandate</li> <li>o works in partnership with the Financial Aid Systems Manager, other SAFA staff and RO and IST managers representing user needs in the evaluation, installation, testing and ongoing maintenance of purchased or locally developed software</li> <li>o oversees the development or modification of operational procedures as new systems are developed.</li> </ul>		
4	<b>Government Financial Aid Administration</b> <ul style="list-style-type: none"> <li>o ensures that all policies and procedures are interpreted correctly, executed efficiently and that UW student needs are satisfied</li> <li>o assesses UW needs for government-funded bursary programs, makes the case for adequate funding allocations and effectively manages the resources allocated for these programs</li> <li>o prepares files and responds to MTCU inspections regularly performed - ensures that high records keeping standards are created and maintained at all times</li> <li>o sets the limits of discretion that can be exercised at various levels within the SAFA Office and ensures that exceptions are adequately documented and consistently fair. Sets the tone for fair and compassionate oversight of appeals and exceptions</li> </ul>		

5	<p><b>Senior Management and Budget:</b></p> <ul style="list-style-type: none"> <li>○ Participates, as part of the senior management team, in formulation, interpretation and implementation of policies affecting the Registrar's Office in evaluation and planning for staff, strategic enrolment management, and overall planning of Registrar activities.</li> <li>○ Participates in a number of other activities for which the Office is responsible including convocation, final examinations, recruitment events and such general and specific duties and assignments that may be determined by the Registrar</li> <li>○ Manage 5 direct reports and responsible for teams totalling 18 FTE</li> <li>○ Acts as Registrar designate during the Registrar's absence</li> <li>○ Develops, monitors and adheres to the annual SAFA administrative budget</li> </ul>
6	<p><b>Deals effectively with students, prospective students and applicants, parents, donors, and UW alumni</b></p> <ul style="list-style-type: none"> <li>○ ensures the efficient management of all financial aid files</li> <li>○ prepares and leads presentations on and off campus related to financial aid opportunities</li> </ul>
7	<p><b>Interprets Government Financial Aid Policy</b></p> <ul style="list-style-type: none"> <li>○ ensures that all policies and procedures are interpreted correctly, executed efficiently</li> <li>○ applies detailed knowledge of the UW student body in the development and oversight of local financial aid and merit-based scholarships</li> <li>○ oversees all financial assistance and academic scholarship programs administered on behalf of the University by the SAFA Office for undergraduate students. These include programs sponsored by provincial and federal government agencies, the locally managed financial aid guarantee, numerous endowed scholarships, and programs sponsored by other public or private agencies</li> <li>○ to assess the impact of policy changes on the SAFA Office and the university at large, and must plan and coordinate the implementation of revised policies and procedures in the student awards and financial aid division</li> <li>○ stays abreast of current research, philosophies and practices related to post-secondary financial aid programs in order to evaluate their relevance to UW and implement those suitable to our setting and needs</li> </ul>
8	<p><b>Administers the UW financial aid guarantee which is a cornerstone of UW's undergraduate enrolment management strategy and a key element in UW's response to the Ontario government's expectation to provide access guarantees</b></p> <ul style="list-style-type: none"> <li>○ advises the Registrar, Associate Provost and the Provost on the strategic use of set aside funds which support undergraduate entrance bursaries, undergraduate and graduate in-course bursaries and the UW work placement program, all of which are key elements in the UW financial aid guarantee</li> <li>○ advises senior administrators on the effective use of tuition set aside funds so that the UW financial aid guarantee harmonises with government programs</li> <li>○ advises the Registrar and other senior managers of the University on locally administered financial aid programs and merit scholarship programs</li> <li>○ develops and justifies budget proposals, oversees the automatic or individual adjudication of student eligibility, manages efficient and effective procedures for the timely disbursement of funds and ensures accurate reporting which is subject to regular government audit and scrutiny</li> <li>○ recommends strategic management of the UW work placement program, develops budgets, allocates jobs across campus, manages salary authorisations and ensures accurate reporting</li> <li>○ oversees the selection of students and the disbursement of bursaries from endowed bursary funds</li> <li>○ monitors the annual investment return in each fund and plans allocations from each fund accordingly</li> <li>○ critically assesses bursary selection and disbursement history and recommends changes to criteria where the bursary is not meeting the needs of the student or addressing the wishes of the donor</li> </ul>

**POSITION REQUIREMENTS**

<i>Education</i>	<ul style="list-style-type: none"> <li>• University degree</li> </ul>								
<i>Experience</i>	<ul style="list-style-type: none"> <li>• Strong project management skills</li> <li>• Strong managerial experience and leadership skills dealing with diverse teams and situations</li> <li>• High degree of planning and coordination skills</li> <li>• Excellent written and verbal communication skills for varied audiences</li> <li>• Excellent relationship management skills to work with a variety of partners both on and off campus</li> <li>• Understanding of issues and trends affecting post-secondary education</li> </ul>								
<i>Technical</i>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">MS Word</td> <td style="width: 25%;">Excel</td> <td style="width: 25%;">PowerPoint</td> <td style="width: 25%;">Other - PeopleSoft</td> </tr> <tr> <td>Above average experience</td> <td>Above average experience</td> <td>Above average experience</td> <td>Above average experience</td> </tr> </table>	MS Word	Excel	PowerPoint	Other - PeopleSoft	Above average experience	Above average experience	Above average experience	Above average experience
MS Word	Excel	PowerPoint	Other - PeopleSoft						
Above average experience	Above average experience	Above average experience	Above average experience						

**NATURE AND SCOPE**

<i>Interpersonal Contacts</i>	<ul style="list-style-type: none"> <li>• This position is one of seven management positions reporting directly to the Registrar. The Associate Registrar, Admissions, the Director, Undergraduate Recruitment &amp; Publications, the Associate Registrar,</li> </ul>
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<i>Level of Responsibility</i>	Records & Systems, three Faculty Assistant Registrars and the Administrative Officer also report directly to the Registrar.	
	<ul style="list-style-type: none"> <li>S/he must maintain a productive working relationship with managers and staff in the Registrar's Office, Deans and Associate Deans, College Heads, Cooperative Education and Career Action, numerous Faculty and College based personnel who deal with financial aid, scholarships and customer service matters, and managers and department heads in other administrative departments. S/he must also work effectively with the senior managers at other Ontario Universities and the Ministry of Training, Colleges and Universities.</li> </ul>	
	<ul style="list-style-type: none"> <li>This position is responsible and accountable for the overall results of the Student Awards &amp; Financial Aid Office</li> </ul>	
	<ul style="list-style-type: none"> <li>Accountable for decisions related to the operation of services related to financial aid, scholarships</li> <li>Works directly with the Registrar and university committees to address necessary changes resulting from strategic plans, academic decisions, university-wide initiatives, and government legislation.</li> </ul>	
<i>Decision-making Authority</i>	<ul style="list-style-type: none"> <li>Accountable for decisions related to the operation of services related to financial aid, scholarships</li> <li>Works directly with the Registrar and university committees to address necessary changes resulting from strategic plans, academic decisions, university-wide initiatives, and government legislation.</li> </ul>	
<i>Physical and Sensory Demands</i>	<ul style="list-style-type: none"> <li>Minimal demands typical of an administrative position within an office environment</li> </ul>	
<i>Working Environment</i>	<i>Travel</i>	<ul style="list-style-type: none"> <li>Minimal</li> </ul>
	<i>Working Hours</i>	<ul style="list-style-type: none"> <li>Regular working hours, some evening/weekend work required</li> </ul>
	<i>Risks – physical and psychological</i>	<p>Psychological risks</p> <ul style="list-style-type: none"> <li>The incumbent must be sensitive to the often extreme and prolonged stresses under which SAFA and other staff in the office must work.</li> <li>This role involves moderate psychological risk resulting from unavoidable exposure to hazardous, disagreeable or uncomfortable environmental conditions.</li> <li>This role involves exposure to emotionally disturbing experiences and/or interactions with people who are upset, angry, abusive, aggressive, unstable or unpredictable (e.g. students or parents who have escalated an issue, staff or faculty upset with a decision), irregular and/or high volumes, multiple and/or tight deadlines beyond one's control, and interruptions (e.g. phone calls, e-mails and unplanned but urgent support requests at different times of year).</li> </ul>
<i>APPROVED BY</i>	Do not complete this section	
<i>USG GRADE</i>	Do not complete this section	
	<i>Title</i>	